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World Production and Trade

United States
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Foreign
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Service

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Weekly
Roundup

WR 18-85

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The Foreign Agricultural Service of the U.S. Department of Agriculture today reported the following developments in world agriculture and trade:

GRAIN AND FEED

In the SOVIET UNION, the spring seeding pace improved during the third week of April, but the overall area planted continued to lag behind recent years. According to the U.S. agricultural attache in Moscow, the Soviets reported that as of April 22 spring crops had been seeded on 19.2 million hectares, including 10.5 million of small grains and pulses, only 364,000 hectares of sunflowers, 1.6 million of sugar beets and 2.6 million of cotton. No planting data have been reported for corn, but it is known to be late. The overall lag is most notable for sunflowers--a full season crop--and small grains. Typically, about 20 percent of these grains and pulses have been planted by this time. The figure is a little more than half of that this year. Only in 1979 and 1980 has the area of small grains planted by this date been smaller. During 1981-84, an average of 1.5 million hectares of sunflowers had been seeded by the end of the third week of April. The long, cold winter and late spring are among the reasons for the lag in spring planting.

OILSEEDS AND PRODUCTS

SPAIN's total soybean imports during November 1984-January 1985 were down 22 percent from a year earlier, and the U.S. market share was down 11 percent. Spain's exports of soybean oil were down 61 percent. The Spanish crushers attribute the fall in soybean oil exports to competition from Brazilian soybean oil and Argentine sunflowerseed oil and lower purchases from India and Pakistan. USDA currently estimates 1984/85 Spanish soybean imports at 2.65 million tons, compared with 2.59 million in 1983/84.

Aided by a relative price advantage over domestic olive oil, soybean oil became PORTUGAL's No. 2 vegetable oil in 1984 and should increase its market share further in 1985. All of Portugal's soybean needs are met through imports, and the United States remains the leading supplier. However, the U.S. market share is expected to fall in 1985. The U.S. agricultural counselor in Lisbon estimates 1985 soybean imports at 920,000 tons, compared with 812,000 tons in 1984.

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DAIRY, LIVESTOCK AND POULTRY

EUROPEAN COMMUNITY (EC) intervention stocks of nonfat dry milk (NDM) on March 28, 1985, totaled 489,000 tons, down 420,000 tons or 46 percent from a year earlier. The EC Commission's costly but successful program of feeding NDM to pigs and poultry has sharply reduced stocks. Butter stocks of 902,000 tons declined 18,000 tons, or 2 percent, during the one-year period.

The EC Commission seems determined to reduce intervention stocks of both NDM and butter. Trade sources indicate that the EC is aggressively pursuing increased export sales of butter. As a result of that effort and the program to feed more NDM to livestock and lower production of butter and NDM this year, intervention stocks of both dairy products are likely to be down from current levels.

Production of poultry meat in TUNISIA totaled 43,000 tons in 1984, 8 percent above the reduced 1983 level, according to the U.S. agricultural officer in Tunis. Production in 1983 was 20 percent below the 1982 record of 50,000 tons because the government sharply reduced subsidies on imported corn and soybeans. Since 1983, government subsidies have increased enough to keep the price of feed relatively stable, resulting in the 1984 recovery of production. Further recovery is expected in 1985, but production is not expected to surpass the 1982 record.

TOBACCO

SWEDEN's cigarette consumption in 1984 dropped from 11.6 billion to 11.5 billion pieces, and cigar and cigarillo consumption decreased from 125 million to 119 million pieces. Smoking tobacco consumption increased from 1,510 tons to 1,740 tons. All of this increase was roll-your-own tobacco. Snuff consumption rose from 4,029 tons to 4,333 tons.

On Dec. 3, 1984, taxes on cigarettes were increased by 7 percent and on smoking tobacco and snuff by 9 to 10 percent. In addition, the Swedish Tobacco Company increased its prices slightly. Large purchases in November by the wholesale and retail trade in anticipation of the price increase may explain the large increase in smoking tobacco and snuff consumption and the small decrease in cigarette consumption.

Selected International Prices

Item	: April 30, 1985	: Change from	: A year	
	:	: previous week	: ago	
ROTTERDAM PRICES 1/				
	\$ per MT	\$ per bu.	\$ per MT	\$ per MT
Wheat:				
Canadian No. 1 CWRS-13.5%.	191.00	5.20	+2.00	197.50
U.S. No. 2 DNS/NS: 14%....	178.50	4.86	+4.75	183.00
U.S. No. 2 S.R.W.	159.00	4.33	-4.50	150.50
U.S. No. 3 H.A.D.....	184.00	5.01	+3.00	186.25
Canadian No. 1 A: Durum...	189.00	5.14	-.50	198.00
Feed grains:				
U.S. No. 3 Yellow Corn....	136.00	3.45	0	157.50
Soybeans and meal:				
U.S. No. 2 Yellow.....	241.50	6.57	-1.25	311.00
Brazil 47/48% SoyaPellets 4/	151.00	--	-3.00	216.00
U.S. 44% Soybean Meal....	148.00	--	-1.00	212.00
U.S. FARM PRICES 3/				
Wheat.....	124.55	3.39	+.37	133.73
Barley.....	85.89	1.87	0	101.96
Corn.....	104.72	2.66	0	128.35
Sorghum.....	97.66	4.43	6/ -.22	109.79
Broilers 7/.....	1042.56	--	+13.89	1180.12
EC IMPORT LEVIES				
Wheat 8/.....	60.75	1.65	-9.40	75.60
Barley.....	59.05	1.29	-7.05	68.80
Corn.....	50.40	1.28	-9.85	54.00
Sorghum.....	67.00	1.70	-7.60	79.10
Broilers 9/.....	158.00	--	-4.00	168.00
EC INTERVENTION PRICES 10/				
Common wheat(feed quality)	147.90	4.03	-6.65	180.75
Bread wheat (min. quality)7/	157.20	4.28	-7.10	196.55
Barley and all				
other feed grains.....	147.90	--	-6.65	180.75
Broilers 11/.....	1104.00		+17.00	1193.00
EC EXPORT RESTITUTIONS (subsidies)				
Wheat	20.40	.56	-6.60	N.A.
Barley.....	40.15	.87	--	41.25
Broilers 9/.....	93.00	--	-5.00	132.00

1/ Asking prices in U.S. dollars for imported grain and soybeans, c.i.f., Rotterdam. 2/ Hundredweight (CWT). 3/ Twelve-city average, wholesale weighted average. 4/ EC category--70 percent whole chicken. 5/ Reflects lower EC export subsidy--down to 20.00 ECU/100 bag effective 9/14/83 from 22.50 ECU/100 bag set in 2/83. 6/ F.o.b. price for R.T.C. broilers at West German border. 7/ Reference price. 8/ Reflects change in level set by EC. N.A.=None authorized. N.Q.=Not quoted. Note: Basis May delivery.

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